LESSONS FROM FPMD

DEVELOPING INFORMATION SYSTEMS FOR MANAGING FAMILY PLANNING PROGRAMS

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in collaboration with

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Executive Summary

The USAID-funded Family Planning Management Development (FPMD) project is implemented by Management Sciences for Health (MSH) in over 30 countries in Africa, Latin America, Asia, and the Near East. Begun in 1990, the project is currently in its second five-year phase. FPMD focuses on developing and institutionalizing effective management practices, which include management information systems (MIS). This volume of the *Lessons from FPMD* series analyzes FPMD's experience in providing technical assistance in MIS.

In each country, FPMD works with a key collaborating organization (usually the Ministry of Health or a national nongovernmental organization) known as the "partner organization." In addition, FPMD works with sister organizations, known as collaborating agencies (CAs). Together, FPMD, the partner organization(s), and the CAs work with and are supported by donor agencies such as the US Agency for International Development (USAID). FPMD provides in-country technical assistance by hiring local experts or providing the technical expertise of its own staff and international consultants.

FPMD's technical approach to developing management information systems has six key elements:

1. Work only where the partner organization is ready for change.

2. Frame the MIS work plan on the organization's strategic goals.

3. Focus on the *use* of information, not just on data processing.

4. Computerize at a pace appropriate to local capacity.

5. Base MIS technical assistance on a broad understanding of reproductive health and family planning programs.

6. Maintain consistency in technical assistance.

FPMD's extensive work to date has yielded ten valuable lessons in developing management information systems. The first four lessons involve the characteristics of the partner organization. The next five pertain to the nature of the technical assistance, and the final lesson concerns donor support. These lessons are:

Lessons about Partner Organizations

Lesson 1: *Establishing unambiguous organizational goals and strategic directions* is the basis for developing an effective MIS.

Lesson 2: *Gaining organizational consensus on management responsibilities and supervisory structures* is a prerequisite for developing an MIS that is appropriate for each management level.

Lesson 3: *Securing* a *strong commitment to developing the MIS* as a support for making decisions is essential so that the MIS development effort does not burden health and family planning staff with collecting and processing unnecessary data.

Lesson 4: *Involving the partner organization's management staff in developing the MIS* is essential to ensure that the MIS responds properly to the organization's information needs, that it is appropriate to its management structures, and that it is actually used to improve decision making.

Lessons about the Nature of Technical Assistance

Lesson 5: *Utilizing external technical assistance that combines program management and MIS expertise* results in a more balanced assessment of the partner organization's needs and keeps the focus of the technical assistance on designing the MIS to improve program management.

Lesson 6: *Using local consultants, appropriately supported and supervised,* develops local talent and allows for a deeper and more realistic understanding of the partner organization and its challenges than using an outside consultant who can only make periodic visits.

Lesson 7: *Providing technical assistance that develops staff skills in tandem with the MIS* increases the probability that the management information system will be used for making sound management decisions and will eventually become sustainable.

Lesson 8: *Using off-the-shelf software, rather than customized software,* should be the first option (whenever possible) when computerizing an MIS.

Lesson 9: *Developing and defining locally appropriate family planning service and management indicators can be accelerated* by incorporating international experience in developing indicators.

Lesson about Donor Participation

Lesson 10: *Providing sufficient latitude in the donor's scope of work* for the collaborating agency greatly enhances the CA's ability to deliver technical assistance that is appropriate to the partner organization's evolving status.

Introduction

The USAID-funded Family Planning Management Development (FPMD) project is implemented by Management Sciences for Health (MSH) in over 30 countries in Africa, Latin America, Asia, and the Near East. Begun in 1990, the project is currently in its second five-year phase. FPMD focuses on developing and institutionalizing effective management practices, which include management information systems (MIS). This volume of the *Lessons from FPMD* series analyzes FPMD's experience in providing technical assistance in MIS.

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An important management intervention in many of the FPMD sub-projects is the development of a well-designed and effectively operating MIS. Such an MIS is essential for providing high-quality services, expanding services, and building sustainable programs. Designing and implementing management information systems that meet an organization's needs without taxing its resources excessively is a complex process. Through its work with a large number of family planning managers in a variety of countries and settings, MSH has accumulated a vast amount of experience in developing management information systems. This monograph is intended to share these lessons with the wider community of public health managers, MIS technical experts, and donors. (See Annex 1 for further information about FPMD's MIS work.)

FPMD'S APPROACH TO MIS

What is MIS?

FPMD defines a management information system (MIS) as a system designed by an organization for collecting and reporting information so that the organization's managers can plan, monitor, and evaluate the operations and performance in their areas of responsibility.

A good MIS produces complete, accurate, and timely information for managers to use as a basis for making appropriate decisions that contribute to the quality, expansion, and sustainability of their programs and organizations. Some of the types of decisions that managers are faced with include the following:

- What is the most appropriate mix of temporary and permanent contraceptives in the local setting?

- Which units (sites, regions, departments) are performing best (worst), and what can be learned from them?

- Which target groups should be focused upon to meet demographic and fertility goals?
- What is the impact of the organization's programs?
- How much can the organization charge for services while still offering affordable, high-quality services to its clients?

A family planning MIS gathers data on many aspects of an organization's work. These data are usually generated by the various subsystems of the organization, including its clinics and its departments of personnel, finance and accounting, commodities management, and facilities management. The data collected include the program's financial, human resource, and commodities *inputs*; the *processes* used to provide services; and the program *outputs*, such as contraceptives distributed or IUDs inserted. Other components of the MIS cover the *results* of the organization's activities (such as the number of new family planning users) and their *impact* (such as the number of births averted).

A well-designed MIS enables managers to analyze and interpret essential data so that they can plan, monitor, and evaluate the operations and performance in their areas of responsibility.

It is well known that many programs require service providers to collect great quantities of data that are never used for decision making. An appropriately designed MIS collects only those data that are to be used for decision making. Thus, the organization must agree, either as a precursor to developing an MIS or as the first step in the process, how program monitoring will be done (for example, whether it will be facility based and/or community based) and what the roles, responsibilities, and authority of each management level are in monitoring program performance, facility functions, administrative operations, staff, supplies, and equipment.

Key elements of FPMD's approach to developing an MIS

FPMD's work with a partner organization generally begins with a management assessment. The assessment is conducted by FPMD staff together with the partner organization's senior managers and is used as the basis for developing a management development plan (MDP). The MDP defines the emphases of FPMD's program of assistance and the modes such assistance will take. A work plan is then prepared for each management area that has been identified for support, such as developing the MIS. The work plan identifies the activities, time frames, and resources required to provide the technical assistance and the outputs that will result from this support. Improving the MIS is usually, but not always, one of several components of FPMD's overall management development plan with the organization.

FPMD has learned through experience that a successful technical approach to developing an MIS includes the following six key elements:

1. Work only where the partner organization is ready for change.
2. Frame the MIS work plan on the organization's strategic goals.
3. Focus on the *use* of information, not just on data processing.
4. Computerize at a pace appropriate to local capacity.

5. Base MIS technical assistance on a broad understanding of reproductive health and family planning programs.

6. Maintain consistency in technical assistance.

Each of these key elements is discussed below. For each element, the discussion first reviews the main points promoting the design and institutionalization of a well-functioning, appropriate MIS. The discussion of each element is followed by several examples from FPMD's field experience. These include both successful and more challenging experiences, in the belief that there is as much to be learned from project efforts that had shortcomings as from those that were great successes. Each section ends with a checklist of key points pertaining to that element.

This document concludes by consolidating and presenting the ten most important lessons FPMD has learned over the last five years in striving to develop effective management information systems for family planning organizations.

Element 1:
Work Only Where the Partner Organization is Ready for Change

Developing and implementing an appropriate management information system begins with examining an organization's management and decision-making systems and structures. This allows the technical assistance organization to identify the changes that are necessary for managers to improve their use of data for making management decisions. Changes may be needed in the type of data to be collected, the way the data flow through the organization, or even the organization's structure.

In the initial assessment, it is essential to identify both the reasons *why* a partner organization feels the need to improve its MIS and also *how* the new MIS will fit into its decision-making structure. Maintaining a dialogue with the partner organization's managers both before and during the process of writing the management development plan (MDP) can provide the collaborating agency with an opportunity to show both the partner agency and the donor how the MIS intervention fits into the broader context of the organization's management objectives.

Sometimes the primary impetus for improving the MIS comes from outside the organization, such as from a donor, rather than from the organization's own managers. Even when the organization's own managers do not see it as a priority, the donor agency may focus on developing or improving the entire MIS or include an MIS component as part of its technical assistance package. During the initial assessment, the collaborating agency can usually determine both the extent to which the partner organization sees MIS as a priority as well as whether there are other management problems and power struggles that are likely to impede the MIS technical assistance effort. If the collaborating agency's scope of work has been narrowly defined by the donor, and limited to supporting MIS as a discrete activity, the agency may be constrained from addressing important underlying management issues. To avoid these problems, the donor should provide an option for redefining the scope of work after the overall management needs assessment has been conducted.

Finally, the technical assistance will only be effective if the organization's managers are committed to making the changes, have the necessary authority to do so, and are both willing and currently able to invest the time and resources necessary to make the changes and to sustain them. To this end, the technical assistance organization should make sure that the partner organization understands and agrees to these conditions prior to commencing the work.

FPMD's Experience

The importance of organizational cohesion at all levels and of commitment to make changes in order to improve the MIS has been amply demonstrated by FPMD's country-level activities. For example, FPMD worked extensively with a nongovernmental organization (NGO) to revise its quarterly reporting system to link together activity monitoring, service statistics, and financial data. The organization's staff were strongly committed to institutional development, and are now using the new MIS regularly for planning and supervision at both the central and the service delivery levels. As a result, the area managers' awareness of and accountability for their actions at the field level have improved and all managers believe that the data are more useful.

FPMD's work with two other NGOs provided a contrasting experience where a lack of organizational commitment seriously affected the development of the MIS. In the first case, when FPMD support began, the partner organization was in the midst of the gravest crisis in its history because of uncertainties over organizational identity, sustainability, leadership, and structural change. Furthermore, FPMD's support was not designed as an integrated, coherent whole to guide the organization through a necessary, radical transformation. Instead, the technical assistance proceeded as a series of discrete activities that included an MIS component. The technical assistance to develop the MIS was considered good, but the partner organization's follow up was very poor. This was cited by one of the organization's staff members, who observed that the MIS consultant made an effort to initiate and develop capacity building through computer training and use and produced a report that contained a lot of suggestions; but that because of the leadership transition the organization had not implemented very many of the suggestions.

In the second case, FPMD's scope of work involved developing a computerized service statistics MIS. The scope of work had been largely developed by the donor and formed one part of a much wider donor package; the rest of the components were to be implemented by other collaborating agencies. It was not clear to what extent the partner organization's own managers saw the need for revising the MIS, had identified its goals, or were committed to its development. In this case, FPMD's scope of work was limited to MIS development, and did not include organizational development.

FPMD detected considerable organizational confusion within the partner organization and therefore hesitated to accept this work. However, FPMD was unwilling to be seen as unresponsive by the donor and was under pressure to get country-level activities underway, so agreed reluctantly to undertake the technical assistance. An initial MIS workshop brought out a number of organizational issues, such as unclear reporting relationships and accountability structures. Since FPMD had no mandate in these areas, it could do little to influence their resolution. The resulting lack of team work and questionable organizational commitment and readiness for change soon became very serious obstacles to the MIS development process.

In spite of FPMD's attempts to engage the partner organization's managers in the endeavor, it was impossible to gain consensus on several crucial issues, such as what reports should be routinely produced, how frequently, and in what format, and what output tables and graphs the reports should contain. The few outputs that were routinely generated were not even circulated regularly to program managers, and they were certainly not used for decision making. The roles of the various program managers and the statistics staff in processing, analyzing, and interpreting the data also remained undefined. Most of the top managers gained little understanding of the computerized service statistics system that FPMD developed, and rarely requested any outputs from the system. Thus, the final impact of FPMD's technical assistance on improving decision making based on appropriate, adequate, and accessible information in this organization was very disappointing.

Remember!

- Work with the partner institution to determine whether it is ready to undertake the necessary management and resource allocation changes that a functioning MIS requires.
- Determine whether the partner organization has reached a consensus about the goals of the MIS or is willing to work to gain consensus.
- Turn down the work if you judge that the situation is too politically "charged" or that the organization is unable or unwilling to address the issues.

Element 2:
Frame the MIS Work Plan on the Organization's Strategic Goals

The basis of an organization's management information system must be its strategic vision. In population and family planning organizations, the strategic vision must take into account the country's demography, the way the demographic situation is likely to change in the future, and the role of the organization in the overall national population effort.

Developing an MIS conceptual framework based on the organization's strategic vision helps to ensure that the organization's MIS will yield the data that are essential for implementing its strategic goals. If such a framework does not exist before the MIS development effort begins, then technical assistance should be provided to the organization's managers in formulating a framework before any further work on the MIS.

The MIS conceptual framework should:

- be based on the key decisions managers must make;
- define information requirements and responsibilities at different management levels of the organization and / or between different organizations;
- delineate the components of the MIS and the main data sources;
- lay out the monitoring mechanisms to be used for service delivery, finances, training, and logistics, as appropriate;
- be accepted by all managers.

Based on the MIS conceptual framework, the technical assistance organization's consultants should work collaboratively with the partner organization's managers to develop a work plan to improve the MIS. Managers from all levels and departments should be involved in this process so that the resulting MIS addresses key information needs at all program levels. Defining clear objectives is essential. Without them, the work plan will be pulled in many directions by competing priorities that are likely to emerge during implementation. It is also critical to make a thorough assessment of the resources that are available, both within the organization and through donor funding, so that the objectives will be realistic and achievable.

Over time, organizational priorities and the financial and human resources available for MIS development may change. The work plan should be updated regularly in a periodic review meeting. The collaborating agency's technical consultants may initiate these meetings to provide a model, but responsibility for running them should be transferred promptly to the managers of the partner organization itself. This develops the partner organization's capacity to learn continuously from what the organization is doing.

Finally, the MIS development effort should capitalize on international experience whenever possible. Much progress has been made in developing family planning service and management indicators in the last few years. The technical assistance included in the work plan should facilitate such standardization by making sure that local managers are familiar with definitions of standard indicators and by demonstrating where these definitions fit within the organization's strategic goals. Whenever possible, the family planning service indicators should be related to costs, revenues, and other aspects of managerial performance and sustainability. One useful reference is *Handbook of Indicators for Family Planning Program Evaluation* (J.T. Bertrand, R.J. Magnani, and J.C. Knowles, The Evaluation Project, Carolina Population Center, Chapel Hill, NC, 1994).

FPMD's Experience

Several of the MIS projects undertaken by FPMD began with an over-ambitious scope of work. In one project, after managers at FPMD's home office conducted an assessment of the absorptive capacity of the partner organization, the environment in which the organization operated, and FPMD's own resource constraints, they decided that the initial scope of work was too broad. The partner organization then selected service statistics and finance as the most important areas for MIS development in view of the organization's strategic program goals. The MIS scope of work was revised and set forth clear priorities, which provided an excellent base for the successful development of a new computerized MIS.

In another country, FPMD collaborated with a national family planning organization in developing a computerized MIS for service delivery and financial management. For various internal reasons, the partner organization could not reach consensus on its MIS conceptual framework, nor could it proceed on schedule to implement FPMD's recommendations. These two factors became serious hindrances to FPMD's work. If jointly developed work plans had been based on a clear conceptual framework that delineated the responsibilities of each partner at each stage of the work, these problems could have been averted.

In a third country, FPMD was asked to develop the MIS for a public sector program that had recently undergone an extensive decentralization of power. This resulted in the local governments' being charged with the responsibility for delivering population and family planning services. No overall conceptual framework for MIS had been developed to take account of these changes, nor was there any organizational agreement on who was to be responsible for each component of the MIS. FPMD's scope of work had been prepared by the donor under a previous, pre-decentralization project without any input from FPMD. It was written in very general terms and did not provide sufficient resources for developing the MIS conceptual framework. This lack of specificity later led to differences in the interpretation of the scope of work between the technical consultants, the partner organizations, and the donor. As a result, both time and resources were wasted before a consensus was reached to narrow the scope of work to developing a community-based family planning monitoring system at the local government level.

In yet another setting, FPMD was asked to integrate two separate information systems in a government health system. One was a unified data collection system for Ministry of Health outpatient services, and the other was a vertical system for family planning data. No consensus was reached on a conceptual framework for the new, unified, comprehensive service statistics system. Because there was no consensus, each time the partner organization's managers changed a new round of negotiations was required in order to maintain support for the new system. Eventually, a full MIS for family planning services was integrated into the outpatient health information system. This new data collection system is meant to be used as the primary method of data collection for family planning statistics, but doubts remain about the extent to which this system will be utilized because the Ministry of Health has not fully accepted the new system.

Finally, FPMD's MIS consultants find that many governments and NGOs are struggling with the process of selecting indicators that measure service utilization and performance. FPMD has frequently found that indicators that measure progress toward program objectives have not been put in place and that there is disagreement about the definitions of the indicators that are in use. In one country where FPMD was developing a community-based monitoring system for the government, nearly a dozen indicators of service utilization were being used to calculate contraceptive prevalence in provinces and cities. Managers and providers were confused about the definitions of new acceptors, current users, defaulters, drop-outs, and clients migrating in and out of communities. Regular miscalculations led to gross misrepresentations of contraceptive prevalence so that, despite the extensive use of a large set of indicators across the country, the partner organization did not have an MIS that systematically collected the appropriate data for monitoring progress toward the national program objectives.

Remember!

- Make sure that the partner organization has a conceptual framework for MIS and that a general consensus on the framework has been reached. If not, help to develop it.
- Base the work plan on the conceptual framework, define clear objectives, and update regularly, if necessary.
- In planning the work, examine not only the data to be collected, the various steps in data processing, and other relevant organizations' MIS activities, but also the congruence between the data and the program objectives.
- Make sure that the work plan shows which tasks are to be undertaken by the technical assistance organization and by the partner organization. Indicate by what date the tasks are to be completed and who within each organization is responsible for accomplishing each task.
- Indicate clearly that if the partner organization is unable to fulfill its responsibilities and abide by the time lines that have been jointly set, work cannot proceed.
- Work toward standardizing indicator definitions that are consistent with international experience.

Element 3:
Focus on the Use of Information, Not Just on Data Processing

The previous sections have repeatedly emphasized the importance of focusing the MIS technical assistance effort on the *use of information for decision making,* rather than simply on improving data processing. Every MIS technical assistance effort should commence by helping the managers of the partner organization to determine which decisions they need to make in their daily work. Sometimes this is not an easy question to answer. Asking the managers to describe a "typical day" and the kinds of tasks or requests that generate a lot of anxiety for them may be helpful in teasing out the key decisions they must make.

The type, content, and frequency of data to be collected and reported, as well as the format and frequency of feedback to lower management levels, must be based on the definition of the types of routine management decisions the managers need to make. If the types of routine management decisions are not well understood, the newly designed MIS may indeed produce good, timely, and accurate data, but on totally inappropriate topics! If the partner organization is not regularly using data from its MIS to make decisions, managers should not be flooded with vast amounts of new data. It is better to include in the MIS design only the minimum, essential information for making key management decisions, and to devote more energy to working with the managers in how to use these data for making decisions.

While the MIS design must provide the information needed to make good management decisions today, it must also anticipate the decisions the managers are likely to face tomorrow. Thus, it is important to maintain flexibility in the MIS design and to link the MIS development process closely to the organization's larger strategic goals. For instance, if the program currently provides free services to clients, the top management may foresee the possibility of adopting user fees in the future. If the MIS is designed in isolation from such strategic thinking, it may be structured as a closed system, preventing the addition of another component, such as service-related costs, at a later date.

The schedule for providing technical assistance should devote adequate time to working with the partner organization's staff on improving their skills in using the data for making decisions. This point is sometimes overlooked when the program of technical assistance is planned. Instead of allocating time for training the local staff on *using* information for management, all the technical assistance time is devoted to *designing* the MIS. In providing the training, a wide range of managers from the partner organization should be included representing all levels and divisions of the organization. If the training only involves the MIS unit staff, other managers are unlikely to become intelligent consumers of information from the new MIS!

The analysis of data should lead to action to the maximum extent possible. Technical consultants should emphasize this point repeatedly in their work with the partner organization. They can do so in formal training sessions on how to use data for making decisions. They should also schedule some time during each technical assistance visit to sit with individual managers in a less formal setting to look at the data from the MIS together and discuss what actions the manager might wish to take on the basis of the results.

FPMD's Experience

In one national-level public sector population program, FPMD trained the partner organization's staff in MIS skills through on-the-job training and formal overseas courses, and provided consultant trainers to work directly with the MIS unit. Over time, most of the managers of this organization came to view the MIS unit as a vitally important resource. By the time FPMD's assistance project ended, the MIS unit was producing an average of ten documents per month, ranging from project proposals to statistical reports, and managers regularly requested and used data from the system in their ongoing work.

Elsewhere, FPMD provided technical assistance in designing a community-based family planning monitoring system. The MIS consultant who began this work elected not to attempt to influence the local managers' selection of data items for the MIS. The result was a multiplicity of confusing terms for types of family planning clients, which were then incorporated into the draft data forms. When a pilot test of the forms was conducted, it showed that these multiple terms caused several misunderstandings and that staff had considerable difficulty completing the forms.

Conscious of these problems, FPMD changed its technical approach partway through the project. The MIS work was refocused much more closely on measuring progress toward program objectives at the local level. The MIS was considerably simplified, which the local managers welcomed eagerly. The evaluation interviews revealed that at the start of the MIS technical assistance, the local managers were unfamiliar with the use of information for making decisions and included in their "wish list" all the possible data items they could think of. They did not expect the MIS consultant to adopt them all, but instead welcomed technical advice on what to include and exclude.

Working with an NGO that was in the midst of organizational change, FPMD's scope of work was limited to developing a computerized management information system and did not include providing assistance in organizational development. With a limited technical assistance budget and internal constraints in the partner organization, only sporadic technical assistance visits could be made, which were used almost exclusively to design a computer program. Very little effort was devoted to helping the partner organization appreciate the significance of the data for making decisions. The one introductory MIS training workshop that FPMD held for the partner organization's staff was not sufficient to make any real difference in the way the organization used management information. Plans to hold another workshop at the end of the project on using the outputs from the MIS for decision making were dropped, because the software was not ready in time.

In another country, FPMD's internal evaluation of its work with the Ministry of Health concluded that the project should have spent more time from the very beginning on identifying essential data required for managing the country's family planning programs and defining how these data should be modified under changing circumstances. Full attention to how the management information would be used was left until the end, giving several persons active in the project the impression that the use of data could be isolated from the other aspects of the MIS.

The importance of training as many of the partner organization's staff as possible was also demonstrated by FPMD's work. In one country, FPMD worked with a major family planning provider organization to improve their service delivery and financial management information systems. The technical assistance focused too much on one or two staff members, rather than disseminating technical skills throughout the agency. When one critical individual unexpectedly resigned from the organization, he took his newly acquired skills with him, greatly diminishing the organization's capacity to benefit from its revised MIS.

In yet another country, at the request of a donor, FPMD provided technical assistance to a group of local collaborating agencies in the development of a standardized program management information system for quality, expansion, and sustainability. Originally, these agencies' senior staff viewed MIS as a matter only for statistical staff and computer experts. FPMD consultants encouraged the program managers to

participate in the MIS development, but these staff members felt that their other responsibilities precluded such involvement. It is interesting to note that these organizations later judged FPMD's assistance to have had limited value. This was partly because they felt that the FPMD technical consultants worked more with the organizations' MIS staff individually rather than always incorporating the organizations' program managers but also because the program managers were somewhat resistant to the standardization of their MIS**.**

Remember!

- In designing an MIS, start by asking the counterpart staff at all levels, "What decisions do you need to make?" and "What data are needed in order to make these decisions?" Base the MIS design on these answers and not just the desire for quicker or more elegant data processing.
- Pay attention to improving the *use* of the data for making decisions, not just to designing and installing the system.
- Make sure that the MIS design is flexible enough to respond to the organization's likely future needs.
- Train all counterpart staff, including those in management positions, to analyze and interpret the MIS outputs so that they become intelligent consumers of information.
- Ensure, to the maximum extent possible, that all data analysis leads to action.
- Develop appropriate protocols for information feedback from higher to lower management levels.

Element 4:
Computerize at a Pace Appropriate to Local Capacity

MIS is much more than computers! Computerizing an MIS should *not* be seen as a solution to all data collection and analysis needs. While electronic data processing can certainly speed up data analysis considerably, without proper preparation the investment can easily be wasted. Computerizing an information system should always start with a well-designed manual system that collects only the data that are essential to the organization's strategic goals. The forms used for collecting data must be well-designed and tested in the field. Operational staff must be familiar with filling them out before taking the step to computerize the system. Finally, the channels for information flow and the procedures for controlling the quality of the data must be made explicit before computerization takes place.

Computerizing data processing is, however, an important part of many donors' MIS assistance efforts. Frequently, donors clearly specify in the scope of work of the collaborating agency that the external MIS support is to result in a computerized MIS. The local organizations, on the other hand, look to the donor and the technical assistance agency to supply the technology that they cannot afford to buy with their own resources. In many developing countries, computer skills are available in the commercial private sector, but organizations in the public and nonprofit sectors can neither afford the salaries necessary to recruit skilled computer staff nor pay for adequate maintenance contracts for the hardware and software. Furthermore, governments and NGOs frequently do not know what to look for in terms of information technology or skills to computerize their management information.

If computerizing the MIS is the aim, but the necessary skills are scarce, investing in computer literacy can pay big dividends. With computerization as a goal, the technical assistance effort must include a thorough assessment of existing levels of computer skills among both MIS and managerial staff of the organization and an appraisal of available training opportunities. It is important to draw up a plan for improving computer literacy through on-the-job training, local short courses, or self-study. The collaborating agency should then try to develop its staff's computer skills in parallel with the design and implementation of the computerized MIS. While there is often pressure to speed up the computerization phase, investing too heavily in this phase at the expense of developing staff skills will compromise the overall progress and usefulness of the new system.

The local capacity to operate and maintain a computerized MIS must be of paramount concern in designing the system. If only basic computer skills can realistically be provided to the partner organization's staff within the lifetime of the project, the system must be simple and easy to operate. The hardware configuration must be supportable with the skills available in the country, and affordable within the organization's budget.

Preference should be given to using off-the-self software that is available locally whenever possible. MIS technical consultants may be tempted to custom-design a software application for every situation. They frequently argue that this would provide a better solution to the organization's data analysis needs than commercially available software. If this assessment is divorced from an overall assessment of the organization's management capacity and the support systems available in the country, the collaborating agency's work plan will be in danger of being skewed toward putting excessive effort into developing new software.

A collaborating agency rarely has adequate resources to fully debug and field-test the software applications its experts design. Getting continued technical support for a commercial software package is much easier than getting support for a custom-tailored software application. If a commercially-available software package suffices to do the job, the availability of backup is a more important consideration than the elegance of the custom-tailored solution.

In summary, when asked to develop a computerized MIS, the external consultant's first task is to assess, in collaboration with the managers of the partner organization, whether computerization is indeed necessary. If the answer is yes, the next step is to develop a good, appropriate design for the MIS, and choose the most user-friendly software that can be supported locally. If the software must be adapted to fit the local needs, the modifications can be done either by using in-house resources, if available, or by hiring a good local programmer. Finally, the external technical consultants must supervise the adaptation of the software and develop in-house hardware and software maintenance skills and a maintenance plan.

FPMD's Experience

FPMD invested in providing adequate training for the staff members of one national-level public sector body in order to improve their MIS and computer skills. The MIS unit came to be seen as a vitally important resource, not only within the organization itself but for other governmental bodies as well. The unit was regularly called upon by the managers to provide reports and other information for improving management and decision making. In addition, the MIS staff provided training in various computer skills to well over a hundred individuals, including senior officers and support staff from a large number of government ministries and offices.

In another country, FPMD supported an NGO whose MIS consisted of a number of manual subsystems that required large amounts of staff time to operate. Accurate reports could not be produced in a timely manner. Data were mainly used for reporting to donors, not for the internal management of the organization. There was no separate MIS unit, and the staff had little training or experience in operating computers.

In this case, FPMD's MIS development plan included developing an integrated MIS in phases, beginning with the priority areas of service statistics and finance. The partner organization approved the MIS plan and promptly established a separate MIS unit. The partner organization's staff were trained in all appropriate aspects of MIS, data collection and reporting forms were standardized, and all definitions, policies, and procedures were documented. At the same time, FPMD employed a local MIS consultant to work with the organization to implement the plan. He not only programmed the computerized systems, using simple off-the-shelf software, but provided regular on-the-job training to the organization's MIS staff and managers. In addition, FPMD supported the participation of the organization's MIS unit director in a short MIS course overseas.

The reporting requirements of the organization's multiple donors made the design of the MIS quite complex. Having the local consultant on site and in close touch with the partner organization's managers ensured that the system design was closely matched to the organization's real needs. The work progressed smoothly to develop two modules, one for financial management and another for service statistics. The financial MIS allowed the organization to monitor and track expenditures much more closely (at both branch and head office levels) than before. The service statistics module, in turn, included a wealth of information that was essential for improving the organization's management. By the end of FPMD's assistance, the managers were very pleased with both modules and ready to implement them.

FPMD had a contrasting experience in a country where it worked at the local government level. A considerable amount of earlier FPMD technical assistance had gone into developing a "prototype"

custom-designed database application for storing data on service delivery, facilities, and personnel. Data entry was complicated by software bugs and the incongruity between data collection forms and data entry screens. Computer capacity at the local level was extremely limited, and resolving these problems was beyond the capacity of the local staff. The concept of a "prototype" software program was alien even for those with more advanced MIS skills at the central level. The local staff remained very unclear about why they were given the software, what these applications were intended for, and how the staff were expected to use them. They were also uncertain about the relationship of this system to the standard data collection systems of the national Department of Health.

FPMD's Boston-based MIS technical consultant provided brief on-the-job training to a very limited number of local government level staff, but this amount of training was clearly insufficient. Gaps of several months occurred between technical assistance visits. Furthermore, the local MIS staff member whom the FPMD project employed in the capital city was not able to provide much support or training either. Even transferring the data to a more user-friendly, menu-driven database software did not improve the situation, because both the local MIS staff member and his supervisors were unfamiliar with this application. A better approach would have been to install appropriate, off-the-shelf software which could be supported locally, and to train local staff to use it.

In yet another project, FPMD's initial assessment noted the limitations of the partner organization's computer hardware and software. Regrettably, no appraisal was made either of the level of computer literacy among the managerial staff nor of the availability and skill levels of the staff who would run the MIS. This was a serious failing. The low level of computer-related skills, and even a reluctance to learn, later proved to be major constraints for developing and sustaining the MIS efforts in this organization. Much of FPMD's overseas technical assistance effort went into designing, programming, installing, and refining a custom-made service statistics system. Other custom-tailored programs were also designed, but in the end could never be implemented. Again, adopting off-the-shelf software, instead of a custom-made one, would have allowed FPMD to pay more attention to training managers in using the information for making decisions. With inadequate attention to this important component, skills transfer was very limited.

Remember!

- Find ways to improve computer literacy *before* making a heavy investment in computerization.
- Design computerized management information systems *strictly* in accordance with the local capacity to operate and maintain such systems.
- Invest time in researching the availability of suitable off-the-shelf software, and use it instead of customized software whenever possible.

Element 5:
Base MIS Technical Assistance on a Broad Understanding of Reproductive Health and Family Planning Programs

The purpose of developing an organization's MIS must be *to improve the quality and availability of key management information*, which is then used regularly by program managers to make better management decisions. The purpose of MIS development is not to design a more sophisticated or elaborate information processing system. It is easy to lose sight of this fundamentally important difference, especially if the work planning process is undertaken only by those with narrow expertise in management information systems and computers.

Members of the collaborating agency team that formulates the work plan for MIS development must possess both broad program management experience and in-depth expertise in management information systems. This is important so that the MIS is designed to support the organization in reaching its program goals and to ensure that the scope of work and level of effort for MIS activities are adequate and appropriate to meet management needs. Therefore, the team must include individuals who are experienced in the day-to-day running of population and family planning programs, as well as those with management information systems and information technology expertise.

Donor support for MIS activities is generally part of a broader package of assistance aimed at improving an organization's management. Responsibilities and time lines for implementing the MIS scope of work must be developed *jointly* between those managing the overall project (in the field and at the home office), the MIS technical consultants, and the partner organization. As the work progresses, strong links and open, regular communication must be maintained between these groups. Their roles should not be confused. If managerial leadership is left solely to individuals who have MIS expertise but only limited program management expertise, the MIS component may well proceed in isolation from or out of sequence with the other management development components, or it may focus on technical areas that are not considered priorities by the managers. The MIS that results from this process may end up being quite inappropriate to the partner organization's goals and priorities and unsustainable within its resources. Even if it is appropriate, it may not ever be employed for decision making, if insufficient resources were devoted to training management staff to use it and developing full, written documentation of processes and procedures.

The development of an MIS is a major organizational effort that takes time, money, effort, and expertise. It is also an area in which many of the partner organization's managers may not have much experience. Frequently, involvement in developing an MIS is still seen as something relevant only to the staff of the MIS or statistics unit rather than the program managers. With their busy schedules, the managers of a partner organization may be tempted to leave the development of the MIS to the external MIS consultants. Nevertheless, the partner organization's management staff must be closely involved in the work in every phase. They should participate in:

- preparing the work plan;
- identifying their information needs;
- defining the MIS conceptual framework;

- reviewing and implementing any recommended changes to the MIS;
- monitoring the progress of the MIS development effort;
- evaluating the final system.

In many cases, the primary counterparts of the MIS technical consultants should be the management staff themselves, rather than the MIS unit staff, who are often data processors or computer programmers with limited or no program management experience.

Leaving the development of the MIS solely to the external MIS consultants compromises the long-term sustainability of the MIS and the institutionalization of the MIS as an essential instrument for making effective management decisions. Outside technical consultants, while experts in their field, must not usurp the role of the partner organization's own managers in determining the data requirements for the new system. Instead, the specific MIS expertise of the consultant should be combined with local knowledge and insights about the available resources and the types of day-to-day management decisions the partner organization needs to make. In this way, the MIS can be developed so that it capitalizes on the strengths of the current system and is appropriate to local needs and capacities. This process also serves the main goal of the technical assistance effort, which should always be the transfer of MIS-related skills to the partner organization's staff, not just the design of a better management information system.

Finally, the work planning process frequently omits two important transitions: making a transition from the old MIS to the new system, and phasing out the technical assistance. Both of these phases are critical to the sustainability of the MIS, and both should be included in the work plan. It is advisable to set aside time at the end of each technical assistance visit to review how these two transitions are progressing.

FPMD's Experience

FPMD was not consistent in linking program management and MIS expertise closely in work planning and monitoring. Where this took place, the work plan was targeted better to the organization's top MIS priorities. Problems arose when responsibility for the MIS component was left largely with an MIS technical consultant who was not adequately linked to the management of the overall technical assistance effort, had limited program management experience, and did not have the involvement of the program managers.

In one intervention, where FPMD worked at the local government level, the primary responsibility for the MIS component first rested with FPMD's Boston-based MIS technical consultant. Ineffective communication between the MIS consultant and project managers about key technical decisions, combined with inadequate technical oversight from Boston, allowed the MIS work plan to be skewed over time toward designing computerized information systems for only two local governments. Very little effort was devoted to developing any local capabilities in analyzing and using data for making decisions. The result was a considerable amount of confusion about the MIS work at the local level. This was eventually resolved by reviewing the technical direction and improving the coordination and communication between the MIS consultant and the managers. The second MIS technical consultant took a broad management approach, and good progress was made in implementing a more focused work plan to redesign a community-based family planning monitoring system.

In another project, FPMD's MIS development effort was able to secure only occasional participation by the partner organization's program managers. Instead, the counterparts for the FPMD technical consultants were programmers and data processors, who were unable to contribute fully to and benefit from the collaboration. As a result, the intervention was less successful.

Remember!

- Include individuals who have both MIS and program expertise when preparing a management development plan and work plan that includes an MIS component.
- Ensure that close communication is maintained between the MIS technical consultants and the managers of the overall technical assistance effort. Do not confuse MIS technical expertise with program and project management expertise.
- Make sure that the implications of MIS technical recommendations for the partner organization (at all levels) and for the overall project (within which the work takes place) are assessed jointly by program managers and MIS experts of both the collaborating agency and the partner organization.
- Involve the partner organization's managers and MIS staff in the work planning process.
- Include transition planning in the work plan, both for phasing in the new MIS and for phasing out the technical assistance.

Element 6:
Maintain Consistency in Technical Assistance

The implementation of a new MIS requires thinking about and using information in a new way. It may necessitate changing the flow of information, and it most certainly dictates that staff acquire new skills. All of these are best achieved when technical assistance is consistent and easily accessible.

Consistency in technical assistance means several things:

- minimizing changes in external staff who provide the assistance;
- ensuring that each subsequent technical assistance visit builds on the earlier ones;
- integrating the work of additional consultants whose input has been deemed necessary.

The above points may seem self-evident, but this is where problems frequently occur. Collaborating agencies do not have vast resources of technical expertise, and may well need to share them among several projects. Scheduling technical assistance visits so that they do not overburden either the partner organization or the MIS technical consultant is not always easy. Staff changes in any organization are inevitable and the availability of any specific consultant cannot necessarily be guaranteed for the duration of a project. Therefore, it is critical to document the technical assistance work in writing, hold clear briefing and debriefing sessions, and make a proper hand-over when staff changes must be made.

When the nature of the scope of work demands the use of several technical consultants, integrating their work is an important task. Developing a team consisting of the technical consultants and the relevant managers of the collaborating agency's overall project greatly facilitates the integration. The team members should receive all reports related to the work, meet regularly to exchange information, and jointly plan next steps.

Even where only one technical consultant is used, it is beneficial to consider the completion of the work as a team activity. In this case, the team consists of the MIS technical consultant, those managing the project either in the field or in the collaborating agency's home office, and the relevant managers of the partner organization. Sharing information through either periodic meetings or regular reports enhances clear communication about the progress of the work.

Whenever possible, local consultants should be used, rather than having technical consultants come from the collaborating agencies home office. This facilitates more frequent and better-informed interactions with the partner organization, allows for a prompt response to emerging problems, and builds local capacity. The external technical assistance from the collaborating agency can then be devoted to supervising the local consultant's work, ensuring that the consultant is exposed to any new knowledge, and facilitating South-to-South exchange of competent local resources.

FPMD's Experience

FPMD had a faltering start in providing assistance to the local government level in a project that was designed to support the development of a community-based family planning monitoring system. This project provided an important lesson about the importance of maintaining clear communication and minimizing staff changes in technical assistance. Because of the time limitations of the Boston-based MIS technical consultant who provided the initial technical direction, several other external consultants were brought in from outside FPMD's own resources to share the workload. Rather than maintaining momentum in the work program, this approach fragmented the technical assistance effort. The linkages between the different assignments were not clear and the technical assistance effort became too scattered to leave many tangible results from the project's first phase. The project's revised approach included transferring the responsibility for technical assistance to one individual and improving communication between the MIS consultant and the project managers.

FPMD provided MIS technical assistance to a project with a national NGO by employing a local, part-time consultant. His work in developing a computerized finance and service statistics MIS was supervised and supported by FPMD's home office staff through periodic supervisory visits and frequent interaction via mail and fax. This approach had clear advantages over the way FPMD worked in many other countries, where the MIS technical work was implemented through intermittent visits by Boston-based staff without a local technical presence. The almost daily interaction of the local consultant with the partner organization fostered a close working relationship with the managerial staff. By being "on site," the local consultant was able to pace the technical assistance to fit with the organizational realities, priorities, and absorptive capacity, and to collaborate with FPMD's local coordination consultant. He became familiar with the strengths and weaknesses of the organization's management to a degree that intermittent out-of-country consultants would be unlikely to obtain. As work progressed on the two MIS modules, the work plan needed very little revision, and was implemented with gratifying speed.

The importance of providing adequate home office support and supervision to the local consultants was demonstrated in another FPMD project, where the majority of the work was carried out by competent local consultants. Unfortunately, they were unable to benefit from the expertise and international experience of FPMD's technical advisors because a change in the donor priorities had resulted in the donor encouraging FPMD to phase out its support. Consequently, FPMD resources allowed only sporadic technical support for their field-based activities. The computerized MIS became much more ambitious than the system envisioned at the beginning of the collaboration. By the end of FPMD's collaboration with the organization, the system was still not operational. Furthermore, there were indications that consensus had not been reached within the partner organization about the information system's function or about the approach to be used in its implementation.

Remember!

- Foster a common philosophy among all technical consultants that their task in working with a partner organization is to start at the level at which the partner organization's managers are, and help *them* define the essential data requirements for management decision making.
- Minimize staff changes among technical consultants.
- Ensure that each technical assistance visit builds on the earlier ones.
- When several MIS technical consultants are used, make sure that their work is well integrated and coordinated.
- Maintain clear communication about the progress of the work among all relevant staff.
- Use locally based consultants whenever possible, to facilitate more frequent and better informed interaction with the client and to provide continuity once technical assistance is completed.
- Supervise and support the local consultant to ensure quality and to develop local consulting capacity.

Key Lessons from FPMD's Experience

Ten key lessons about factors that enhance or detract from the success of a technical assistance effort in MIS development emerged from FPMD's work in a variety of situations and organizations. The first four of these lessons involve the characteristics of the partner organization. The next five pertain to the nature of the technical assistance, and the final lesson concerns donor support. These valuable lessons are already being applied to FPMD's work under its new five-year project. They are shared here with the broader community of family planning and reproductive health program managers, their MIS staff, collaborating agencies, and donors in the hope that others will also find them helpful in furthering their thinking about MIS as a crucial management tool.

Lesson 1: *Establishing unambiguous organizational goals and strategic directions* is the basis for developing an effective MIS. An organization that has thought through its goals and strategies is ready to work with a collaborating agency to identify the data that best allow its managers to assess progress. An organization where such goals and strategies are vague or perhaps still under debate will speak in multiple voices when attempting to pinpoint its information needs for decision making.

Lesson 2: *Gaining organizational consensus on management responsibilities and supervisory structures* is a prerequisite for developing an MIS that is appropriate for each management level. If, at the start of the MIS development process, management responsibilities and supervisory structures in the partner organization are vague, the very first step in the MIS development process must be to work with the organization to form this consensus.

Lesson 3: *Securing a strong commitment to developing the MIS* as a support for making decisions is essential so that the MIS development effort does not result in burdening health and family planning staff with collecting and processing unnecessary data. The overriding reason for developing a better MIS must be to improve decision making, not just to develop more appropriate data collection forms, improve the flow of data, or have more sophisticated data analysis capabilities.

Lesson 4: *Involving the partner organization's management staff in developing the MIS* is vitally important. If the management information system is to respond properly to the organization's information needs, be appropriate to its management structures, and actually be used for improving decision making, those responsible for managing the organization's work must be involved in each stage of the MIS development process.

Lesson 5: *Utilizing external technical assistance that combines program management and MIS expertise* results in a more balanced assessment of a partner organization's needs and keeps the focus of the technical assistance on designing the MIS to improve program management. The MIS that results from this collaboration is much more likely to be centered on the organization's goals and strategies and be sustainable within its human and financial resources.

Lesson 6: *Using local consultants, appropriately supported and supervised,* greatly enhances the success of the technical assistance effort. It allows for a much deeper and more up-to-date understanding of the partner organization and its challenges than could be achieved through periodic technical assistance visits from

outside the country. Furthermore, the use of local consultants, appropriately supported and supervised, develops domestic talent that will be accessible to local organizations in the future.

Lesson 7: *Providing technical assistance that develops staff skills in tandem with the MIS* increases the probability that the management information system will eventually be sustainable. Improving the analytic skills of managers in examining and interpreting the data for management decision making and providing basic software and hardware maintenance skills for staff of organizations with computerized management information systems are both important components of technical assistance.

Lesson 8: *Using off-the-shelf software, rather than customized software,* should be the first option (whenever possible) when computerizing an MIS. After the technical assistance has ended, backup for commercially available software is much easier to obtain than finding support for a custom-tailored software application. Collaborating agencies rarely have sufficient resources to complete debugging and field-testing software applications that have been custom-tailored for a particular organization.

Lesson 9: *Developing and defining locally appropriate family planning service and management indicators can be accelerated* by incorporating international experience in developing indicators. Technical assistance resources can then be freed to focus on relating family planning service indicators to other important information on costs, revenues, and service quality.

Lesson 10: *Providing sufficient latitude in the donor's scope of work* for the collaborating agency enhances the CA's ability to deliver technical assistance that is appropriate to the partner organization's status. When the donor correctly perceives that improving the organization's management information system requires a very broad management assessment and approach, and does not limit the technical assistance to a narrow scope of work, the collaborating agency is in a much better position to design a holistic approach best suited to improving the organization's overall MIS capacity and its use of information for making management decisions.

Appendix
MIS Technical Assistance under the FPMD Project, 1990-1995

Country	Partner Organization	Type of MIS Intervention
Bangladesh	Local Initiatives Program (LIP)*	Eligible Couple (ELCO) mapping
Bangladesh	Collaborating Agency / Nongovernmental Organizations (CA / NGO) Project*	Developing indicators for measuring program expansion and sustainability Developing a computer program for data input and report generation Improving the CAs reporting ability Streamlining reporting formats
Bolivia	Centro de Investigación, Educación y Servicios (CIES)*	Assessing service statistics quality Developing streamlined data collection procedures and systems Designing, testing, and revising formats Funding for a visit to PROSALUD to observe its financial management system Assessment by Tec-Apro of financial MIS Purchasing and installing financial MIS modules for accounting, budgeting, and fixed assets
Ecuador	Centro de Estudios de Población y Paternidad Responsable*	Developing a financial MIS
Honduras	Asociación Hondureña de la Planificación Familiar (ASHONPLAFA)*	Assessing service delivery and accounting MIS Standardizing reports
Jamaica	National Family Planning Board**	Computerizing the service statistics system, and training Improving reporting formats

* The FPMD MIS intervention was one component in a broader program of technical assistance.

** MIS support was the only technical assistance provided.

Country	Partner Organization	Type of MIS Intervention
Kenya	Christian Health Association of Kenya (CHAK)*	Developing a service statistics MIS for monitoring client numbers and method mix at service delivery points Revising data collection forms Developing a family planning activity monitoring system Developing a database on physical facilities and staffing at health units Providing hardware and software Supporting a long-term MIS Coordinator Providing training and documentation
Kenya	Family Planning Association of Kenya (FPAK)*	Conducting a comprehensive review of MIS Developing a financial MIS for tracking income and expenditures at all levels and an accompanying financial procedures manual Developing a service statistics MIS for monitoring new and continuing acceptors, method mix, and referrals at static and mobile clinics Developing an activity monitoring system Providing hardware and software Providing training and documentation
Kenya	Diocese of Maseno West-Christian Community Services*	Developing a service statistics MIS for monitoring new and continuing acceptors, and the method mix Developing an activity monitoring system Providing hardware and software Providing training and documentation
Kenya	Mkomani Clinic Society*	Developing a service statistics MIS for monitoring new and continuing acceptors, and the method mix Developing an activity monitoring system Providing software for payroll processing Providing hardware and software Relevant training and documentation
Kenya	National Council for Population and Development*	Developing and institutionalizing an MIS unit Providing hardware and software, and extensive training Funding two staff positions Developing a service statistics MIS and an NGO activity monitoring system Developing a financial MIS Providing training and documentation

* The FPMD MIS intervention was one component in a broader program of technical assistance.

** MIS support was the only technical assistance provided.

Country	Partner Organization	Type of MIS Intervention
Kenya	Seventh Day Adventist/Rural Health Services*	Developing a financial MIS with an accompanying financial procedures manual Developing a service statistics MIS and an activity monitoring system Providing training and documentation
Nepal	Family Planning Association of Nepal*	Strengthening and computerizing systems for service statistics, and accounting Developing a service statistics recording and reporting format for the village development committee level Training headquarters staff in microcomputer use and in completion of new forms Creating MIS Unit Providing external training for the MIS manager Providing local staff training in data analysis and use
Peru	Ministry of Health*	Integrating two data collection and processing systems into a unified HIS/MIS and computerizing the system
Philippines	Department of Health and Local Government Units*	Developing a community-based monitoring system for family planning services Pilot testing computerized data base systems for inventories of trained personnel, equipment, and service statistics Developing a pilot MIS for accounting
Tunisia	Office National de la Famille et de la Population**	Developing a computerized cost accounting system
Turkey	Ministry of Health**	Developing and implementing a computerized service statistics data collection and reporting system Training MIS trainers
Regional	Centre for African Family Studies*	Providing hardware, software, and extensive training Supporting the capacity to set up and manage a computerized office
Project-wide	Commodities and Logistics Management (CLM)[1]**	Developing software

[1] CLM development was funded by several donors.

* The FPMD MIS intervention was one component in a broader program of technical assistance.

** MIS support was the only technical assistance provided.